



Account-Related Products and e-Services

June 28, 2005



Methods to Resolve Account Issues

- Traditional Channels - live telephone assistance, fax, written correspondence
- Self-service options – automated telephone, internet research and internet self-assist applications
- e-Services – tax professionals tools

June 28, 2005



Automated Telephone Applications

- Available 24 X 7
- Tele-Tax Refund Inquiry Line
- Tele-Tax Recorded Topics – includes some account issues
- Transcript Request Service



Internet Research and Self-Assistance Applications

- “Where’s My Refund” and “EITC Assistant” applications
- Tax Topics and Tax Trails
- Frequently Asked Questions (FAQs), Publications, Forms
- Internet Employer Identification Numbers (I-EIN)


June 28, 2005



“Where’s My Refund”

- Stand-alone application on www.irs.gov
- Provides verification of:
 - Return receipt
 - Processing
 - Refund Issuance
- Available for taxpayers and their representatives
- Provides processing/math error explanations, refund trace and undelivered refund re-issuance


June 28, 2005



Tax Topics & Tax Trails / FAQs / Forms & Pubs

- Tax Topics / Tax Trails / FAQs – generally tax law topics - some account topics
- Tax Trails – interactive probing to determine qualifications
- Most forms and publications available, including some prior year versions

June 28, 2005

The left side of the slide features a vertical banner with a blue-to-orange gradient. At the top is the 'IRS e-file' logo. Below it, there are silhouettes of people in business attire. The bottom of the banner contains the text 'IRS Nationwide 2005 TaxFORUM' in white and red. The main title is centered on a dark blue background.

Internet Employer Identification Number (I-EIN)

- Stand-alone application on www.irs.gov
- Complete on-line Form SS-4
- Preliminary validation of SS-4 information
- EIN assigned on-line during session

June 28, 2005



e-Services

- Products available to all:
 - Registration
 - IRS *e-file* Application
 - Preparer Tax Identification Number (PTIN)
 - TIN Matching
- Incentive Products:
 - Disclosure Authorization (DA)
 - Transcript Delivery System (TDS)
 - Electronic Account Resolution (EAR)

June 28, 2005



Disclosure Authorization (DA)

- Registered and authorized third parties send POA (Form 2848) or TIA (Form 8821) request via internet
- Change or additions to existing authorizations
- Immediate verification of request

June 28, 2005



Transcript Delivery System (TDS)

- Information provided on:
 - Account Transcripts
 - Return Transcripts
 - Record of Account
 - Wage & Income Returns
- Responses delivered on-line or sent to secure mailbox

June 28, 2005



Electronic Account Resolution (EAR)

- Submit on-line account inquiries
- Receive on-line acknowledgement
- E-mail notification when response received
- Response time goal – 3 business days



For More Information:

- Visit www.irs.gov
- Proceed to the IRS *e*-Business Center
- Visit exhibit hall booth
- Attend related seminars

June 28, 2005